

Redacted

Project Director Services For the MMIS Implementation Project

**Technical Proposal
Request for Proposal MED-12-018**

August 17, 2011

William Larkin Consulting, LLC

14388 East Geronimo Road
Scottsdale, Arizona 85259
billlark@gmail.com
Phone: (480) 776-9996

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Tab 1 Transmittal Letter

3.2.1 Information to Include Behind Tab 1:

Transmittal Letter.

The transmittal letter serves as a cover letter for the Technical Proposal. It must consist of an executive summary that briefly reviews the strengths of the bidder and key features of its proposed approach to meet the requirements of this RFP.

The Transmittal Letter is on the following page.

August 16, 2011

Mary Tavegia
Issuing Officer
Iowa Department of Human Services
Iowa Medicaid Enterprise
100 Army Post Road
Des Moines, Iowa 50315

Dear Ms. Tavegia:

On behalf of William Larkin Consulting, LLC (WLC), I am pleased to present the State of Iowa with our response to the Request for Proposals (RFP) MED-11-018, Project Director Services for the MMIS Implementation Project.

William Larkin Consulting is a limited liability corporation incorporated in the State of Arizona. We are in process of registering to do business in the State of Iowa. I will serve as the primary contact for all RFP-related communications, including any requests for clarification or other communication needed between the IME staff and WLC. My contact information is as follows:

William Larkin
Managing Principal
William Larkin Consulting, LLC
14388 East Geronimo Road
Scottsdale, Arizona 85259
Email: billlark@gmail.com

P: 480-776-9996
F: 480-451-4319

As instructed, we have provided one (1) original and four (4) copies of the technical proposal with one (1) copy on CD-ROM. We are also including, packaged separately, one (1) original and four (4) copies of the cost proposal, with one (1) copy on CD-ROM.

WLC makes the following certifications and guarantees regarding this proposal:

- WLC will comply with all contract terms and conditions as indicated in this RFP.
- No attempt has been made or will be made by WLC to induce any other person or firm to submit or not to submit a proposal.
- WLC does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap.
- No cost or pricing information has been included in this letter or the Technical Proposal.
- WLC's proposal is predicated upon the RFP published on July 18, 2011.
- WLC certifies that the prices contained in this bid proposal have been arrived at independently, without consultation, communication, or agreement, as to any matter relating to such prices with any other bidder or with any competitor for the purpose of restricting competition; and, unless otherwise required by law, the prices quoted have not been knowingly disclosed by WLC prior to award, directly or indirectly, to any other bidder or to any competitor.
- WLC will not be using a subcontractor in the provision of the services contained in this bid proposal.
- WLC acknowledges and accepts all term and conditions stated in the RFP.

We have been honored to be a part of the Iowa Medicaid Enterprise since its inception. The IME and the Iowa Medicaid Program are innovators and the potential for this business model will be further realized in the implementation of new

William Larkin Consulting • Technical Proposal to Iowa Department of Human Services MED-12-018 • Page 4 of 22

application infrastructure that will have the adaptability and flexibility needed to manage the Medicaid program in the era of Health Care Reform.

Strengths of the Proposed Team

Bill Larkin has been in the forefront of health information technology with over 38 years of executive, project management, and program implementation skills. He is known for his innovation and practical application of new technology to improve managed care plans and government-funded health care programs, including Medicaid and Medicare. As a former Partner in Fox Systems and senior executive with two Medicaid operations contractors, he has over 30 years of progressive responsibility. He saw the need in the marketplace for a new kind of consulting company that is client-centric and focused on health information technology of the future, and he founded William Larkin Consulting in May 2010 to meet the needs of large, publicly funded health care organizations who need strategic direction and executive management of new HIT projects, including MMIS, Health Information Exchange, and Health Insurance Exchange.

Bill Larkin is proposed as the Project Director, who is available on a full-time basis. He is committed to this project because of his dedication to the spirit of the IME, and his long-time knowledge and understanding of the Iowa Medicaid Program, having worked with Iowa Medicaid since 1980. A review of his resume will substantiate that he is uniquely qualified to serve as the Project Director. We also believe in his role as Project Director Mr. Larkin will foster project communications and executive oversight and coverage of the many projects under way. Mr. Larkin will be dedicated 100% of FTE to the MMIS Implementation Project. While not included in this proposal, WLC has additional Project Directors available to supplement Mr. Larkin if the workload is greater than one person can manage.

Key Features of the Proposed Approach

The proposed approach is based on the principles of openness and transparency that are hallmarks of the IME. WLC places a very high value structure on the free flow of information through defined channels of communication and accountability. The proposed Project Director is an established leader who gains respect through knowledge and experience combined with excellent communication and project management skills honed through countless MMIS projects.

WLC's proposed Project Director has worked closely with senior State staff in a wide range of roles, as state staff, as a contractor, as a consultant, and as a health plan subcontractor to the Medicare Program. He has developed and supported effective project governance structures, and he is most knowledgeable about MITA and MMIS requirements. The proposed Deputy Project Director has similar experience and brings tremendous knowledge and operational intelligence that will be a great asset in the management and coordination of contractors, contracted consultants, and limited state staff.

Selection of WLC will enable the Department to rely on the Project Director to improve on the approach to achieving the many simultaneous projects scheduled to be accomplished in the next three to five years. We would like to be a key part of this team.

WLC will carry out all contract responsibilities in the same highly professional and successful manner to which all our clients have become accustomed. Please contact me should you have any questions or need additional information.

Sincerely,

William Larkin
Managing Principal

Tab 2 Bidder's Approach to Meeting Deliverables

3.2.2 Information to Include Behind Tab 2: Bidder's Approach to Meeting Deliverables.

To address the bidder's approach to meeting the deliverables set forth in Section 1.3 of the RFP, the bidder shall submit no more than one page of text (1) explaining how the bidder will be able to meet all Deliverables set forth in the Scope of Work using a key person(s) assigned to the Contract and, (2) identifying any inability of the bidder or key person(s) to fully meet the Scope of Work requirements.

Note:

- *Bid Proposals shall identify any deviations from the requirements the bidder cannot satisfy.*
- *Bid Proposals shall not contain promotional or display materials unless specifically required.*

If a bidder proposes more than one method of meeting the RFP requirements, each method must be drafted and submitted as separate Bid Proposals. Each will be evaluated separately.

WLC has developed an approach that will ensure that we meet all the requirements in the scope of work without any exceptions or deviations. Our one page approach to meeting the project deliverables is on the following page.

Our approach is based on a project directorate structure that provides depth and redundancy while ensuring that dedicated staff is focused on keeping all of the components of the MMIS implementation in focus and coordinated with other DHS, State of Iowa and federal health care initiatives.

Leadership is best demonstrated in action and commitment to values that will lead to effective project management and success. WLC has a demonstrated track record of successful projects, attention to detail, and dedication to project objectives, including on time delivery and system accuracy.

WLC understands the importance of the role of the Project Director in the MMIS Project and the responsibilities of the Project Director to manage and lead the effort for the Department while the ongoing challenges of managing the Iowa Medicaid program and operating the Iowa Medicaid Enterprise continue at full speed. As Project Director, WLC will manage and coordinate the full array of support teams, consisting of both Department and contractor team members.

WLC will support the Executive Sponsors, in their roles as the Executive Steering Committee, by providing milestone reporting, risk management, and policy issues information to guide Department monitoring and decision-making.

Planning is the art of envisioning change and setting the course to get to a desired outcome.

WLC will provide planning support to keep the MMIS project in synch with other Medicaid program and health reform activities. WLC brings unparalleled knowledge and awareness of the big picture of HITECH, ARRA, CHIPRA, and ACA initiatives that are impacting all state Medicaid programs. WLC can support the Department in many ways through information sharing, impact assessment, and periodic briefings. WLC can support other project governance and procurement activities so that MMIS and IME interests are well represented.

Oversight and Management is the never ending process of learning about one's environment and directing others to take many small steps toward an achievable goal.

WLC views the Project Director as an Executive Office function that sits above the project management level of each project to actively manage on behalf of the Executive Sponsors. It requires people and management skills to act both proactively (planning, risk management) and reactively (issue management, change management) while keeping on top of the many details that arise daily and may be symptomatic or non-symptomatic, with the knowledge and understanding to classify and differentiate those that are most important or require escalation.

Communication is a uniquely human activity as one has to have something to say, and others must listen in order to receive the message and must think in order to understand the meaning.

The proposed Project Director has the interpersonal and presentation skills to be able to ensure that all stakeholders and project participants have the information needed, on a continuously day-to-day basis, and at measured intervals, as in periodic Executive Steering Committee meetings. WLC has unique skill and communications abilities; we will prepare and present concise regular status reports and monthly status reports in a format and with content that is familiar to each audience. We will also work with the other MMIS contractors to ensure that their status reporting formal communications are aligned and consistent.

Reporting Good status reporting does more than present the news; it must provide depth, perspective, and context in order for information to be actionable.

WLC will submit weekly status reports to the Iowa Medicaid Director and others on a weekly basis. WLC will provide a standardized template for approval that will be used as both a contemporary project journal and an activity monitor focused on accomplishments, planned accomplishments, and pertinent issues that need to be elevated in order to be effectively resolved.

Tab 3 Letter of Commitment of Key Personnel.

3.2.3 Information to Include Behind Tab 3: Letter of Commitment of Key Personnel.

Include the letter of commitment of the candidate being offered.

August, 14, 2011

Mr. William Larkin
Managing Principal
William Larkin Consulting, LLC
14388 East Geronimo Road
Scottsdale, Arizona 85259

Dear Mr. Larkin:

This is a letter of commitment by me to be bid as a member of our company's team to provide Project Director Services for the Iowa MMIS Project. I have read and I understand the requirements of RFP MED-12-018, in particular the scope of work on the project, as specified in RFP Section 1.3. My background and experience, as found in resume, establishes my qualifications for the services to be provided.

I am fully committed to this project, during the term specified in the RFP and I agree to be available on a full time basis to work on this project, subject to the finalization of the contract between William Larkin Consulting, LLC and the Iowa Department of Human Services.

I look forward to working in Des Moines on this project.

Sincerely,


William Larkin

Tab 4 Resume of Candidate Being Offered

3.2.4 Information to Include Behind Tab 4: Resume of Candidate being offered.

The Bid Proposal must contain a resume of the individual being offered as a candidate to perform the scope of work set forth in Section 1.3.

WLC is presenting two exceptional candidates, William Larkin and Brent Bizik.

Qualification Summary

For each candidate we present a summary of the candidate's qualifications

William Larkin Qualifications

Key Personnel Requirement	WLC Candidate William Larkin
a. Project Management – knowledge of the principles and tools needed for the successful implementation of a large, complex project with a minimum of 5 years experience as a project manager in a large system or business implementation.	Mr. Larkin has over 30 years of MMIS system implementation experience, in Florida, Tennessee, Iowa, and Oregon. In addition, as the Vice President of Consulting at Fox Systems, he was client executive and oversaw the procurement and implementation of over 20 MMIS systems. In addition to his client facing duties, he managed the development of repeatable practices and oversaw Fox Systems growth until 2010..
b. Medicaid Experience – must have worked in a Medicaid environment for a minimum of 8 years with knowledge of how a Medicaid Management Information System (MMIS) works, how policy is developed, and how a Medicaid enterprise operates on a daily basis.	Mr. Larkin is a recognized authority all aspects of Medicaid Management Information Systems, with over 38 years of experience beginning with the first MMIS implementation in Ohio in 1973, and as a Project Manager with System Development Corporation (now Molina) in Iowa as the Operations Manager. He also has 13 years Project Manager experience with Consultec (now Xerox/ACS). As Partner at Fox Systems, he served as an MMIS thought leader and strategist. This is best represented by the work that FOX did in Iowa to assist in the development of the Iowa Medicaid Enterprise in 2004.
c. MITA Must be familiar with all concepts of the Medicaid Information Technology Architecture (MITA) and how it is applied to a Medicaid enterprise.	Mr. Larkin is an expert in Medicaid business process modeling. As the Fox Project Manager in Oregon, he development the conceptual business process model that was contributed by Oregon to the CMS MITA Project, and became the MITA business model. He also served as an executive contributor to MITA, and developed the FOX MITA practice, based on the Fox authored MITA 2.0 State Self Assessment.
d. Large Scale Projects Must have managed the resources for a large project including personnel and funds within the last 5 years.	Mr. Larkin had full profit and loss responsibility for all of Fox Systems Medicaid engagements, including procurement, quality assurance, IV&V, implementation assistance and HIPAA compliance assessment. In addition, from 2005 through 2007, he was founder and Chief Operating Officer for the Fox Insurance Company, a Medicare Prescription Drug Plan in 23 states, including Iowa.
e. Iowa Knowledge Must be familiar with Iowa's procurement and	Mr. Larkin has had almost continuous engagement with the Iowa Medicaid Program since 1980, when System Development

Key Personnel Requirement	WLC Candidate William Larkin
contract management policies and procedures.	Corporation took over the Title XIX Program from Iowa Blue Cross Blue Shield. Most recently, he directed the procurement efforts in the initial IME procurements in 2005, and was client executive for the IME Contract at Fox in 2008 until he left Fox in 2010.
f. Quality Management Must have a minimum of 5 years of quality management in a large, complex environment.	Mr. Larkin is very familiar with a full range of quality management processes and methods. He was responsible for the development of the FOX IV&V methodology, based on IEEE and PMI standards, and developed the checklist methodologies for deliverable review. Under his direction Fox developed a library of MMIS test cases and scenarios for testing. In addition, he was engaged in the executive team at Fox for both ISO9000 and CMMI (Level 2) certification.
g. Risk Management Ability to identify and differentiate the importance of issues and risks and escalate or resolve those of a critical nature in a timely manner.	Mr. Larkin was responsible for independent Risk Management for Noridian Administrative Services in the IME implementation in 2005. He did the risk identification, risk monitoring, and risk reporting directly to the Noridian Executive Vice President, and assisted them in their mitigation and corrective action efforts. Mr. Larkin has complete familiarity with issues management and working with large multi partner organizations to resolve issues and to escalate issues when needed for timely resolution.
h. Must have a minimum of 4 years experience in contract or vendor management.	As a contractor, and as a consultant to Medicaid agencies, Mr. Larkin has over 25 years of experience in contract and vendor management, and is fully familiar with fixed price, time and materials and award fee contracts. He has been responsible for contracts in all stages of the contract lifecycle, and has worked with states to develop contract requirements, terms and conditions and performance based contracts.
i. Ability to develop strong collaborative relationships across a multi-layered organization.	Mr. Larkin is respected for his insight, ability to listen, and ability to understand other organizations from the perspective of their point of view. He has been engaged in many multi organization committees and workgroup, mostly recently in Health Information Exchange development efforts in three states.
j. Ability to facilitate a positive culture that supports Agency goals, promote individual and team initiative, and foster open communication through all levels of the organization.	Mr. Larkin's previous experience in Iowa demonstrates his ability to support culture and environment that encourages individuals and organizations to rise to the occasion and to perform at the highest level of ability.
k. Must possess outstanding interpersonal and conflict resolution skills.	Mr. Larkin is a skilled communicator with excellent people skills and problem solving skills, developed through deep business and technical knowledge that aids in his ability grasp and resolve business conflicts.
l. Ability to prioritize, meet deadlines, and excel in a fast paced work environment.	Mr. Larkin has always worked in this type of environment across a multitude of successful Medicaid and MMIS projects.

Resume

William Larkin Project Director

Overview

Mr. Larkin is a Managing Principal at William Larkin Consulting, LLC and has extensive experience as a Client Executive, Senior Project Manager, and Business Analyst on the design, development, and implementation of large Medicaid Management Information Systems (MMIS), Health Information Exchange (HIE), and other healthcare information systems over the last 38 years.

As a Partner/Vice President at FOX, Mr. Larkin was responsible for all Medicaid consulting projects, including business development and service delivery. He led the development of the Fox project management office and the repeatable processes that define the FOX project management and quality assurance methodologies. Mr. Larkin is recognized as one of the experts in Medicaid strategic planning, and has assisted a number of states in executive strategy, goal setting, and change management, including Arkansas and Iowa.

Mr. Larkin served as Client Executive for the Iowa Medicaid Enterprise systems and professional services project. He also served as the Project Lead to assist the state of Arkansas in the development of the grant application to the Office of the National Coordinator (ONC) for the statewide Arkansas health information exchange, now named SHARE. He has served as Client Executive for some of the largest and most challenging health care IT projects, including the Arizona Medical Information Exchange, the Medi-Cal MMIS/FI Procurement, and the Tennessee and Florida MMIS implementations.

Concurrent with his responsibilities at FOX, he was founder and Chief Operating Officer for the Fox Insurance Company, an AZ licensed health care insurer who operated a Medicare Prescription Drug Program in 23 states, including Iowa, prior to being sold in 2007. Before joining FOX, Mr. Larkin was President of HealthNet Data Link, a firm developing and offering Web-based system applications to health care providers and insurers, including a pioneering health insurance exchange.

Employment Summary

Organization	Position	Dates
William Larkin Consulting, LLC	Managing Principal	2010 - Present
FOX Systems, Inc.	Vice President	2000 - 2010
HealthNet Data Link, Inc.	President	1998 – 2000
Consultec, Inc.	Director, Business Development	1993 – 1998
Consultec, Inc.	Special Projects Manager	1990 – 1993
Consultec, Inc.	Operations Manager	1988 – 1990
Consultec, Inc.	Account Manager	1985 – 1988
System Development Corporation	Project Manager	1982 – 1985
System Development Corporation	Claims Operations/Provider Relations Manager	1980 – 1981
Independent Consultant	IT Consultant	1979 – 1980
Ohio Department of Public Welfare	Management Consultant	1973 - 1979

Key Qualifications

- Subject Matter Expert in strategic planning, business modeling, and health information technology
- Expertise in project management, quality assurance, and IV&V
- In-depth knowledge of all aspects of Medicaid programs and systems, including MITA
- Design, development, and implementation of MMIS in Ohio, Florida, Oregon, Tennessee, and Iowa
- Expert in Medicaid eligibility systems and Medicaid system information exchange
- Development of automated forms of eligibility verification and authentication
- Testing, installation, and operation of a large claims processing, Electronic Data Interchange (EDI), pharmacy Point of Sale (POS) systems for the States of Florida, Missouri, Tennessee, and West Virginia

Relevant Experience

Arkansas Division of Medical Services

Senior Consultant responsible for the development of the strategic planning to define and develop the Arkansas Medicaid Enterprise, a new business model for managing the Arkansas Medicaid Program. Advised the Medicaid Director and worked with the Fox Project Team to take the strategic concepts.

Arkansas Office Of Health Information Technology

Strategic Consultant to the Arkansas HIT Coordinator, assisted with the development of the statewide Health information Exchange (HIE) strategic plan. Had lead responsibility for defining the strategy to work with the state Medicaid program to align HIE and Medicaid maximization of HIE. Provided planning and technical consulting for business and technical operations planning to the Arkansas Center for Health Care Improvement (ACHI).

Western Pennsylvania (WPA)—Regional Health Information Exchange and Health Information Organization

Strategic Consultant to a 34 hospital organization and assisted in creating a strategic plan to develop a regional Health Information Exchange. Project responsibilities included:

- Conducting environmental scan and technical systems capability analysis
- Developing Use Cases and Priority Sequencing Recommendations
- Evaluating HIE models for recommendation
- Developing and presenting a Technical Recommendation to Support Financial Analysis

Tennessee Bureau of TennCare

Client Executive for the FOX team that provided requirements definitions, procurement, and Independent Verification & Validation (IV&V) support for the new TCMIS managed care system and data warehouse/Decision Support System (DSS). Oversaw Joint Application Design sessions, requirements documentation, and RFP and procurement support, and served as Client Executive for the FOX IV&V team that is helped the state implement the new TCMIS.

Iowa Department of Human Services

Client Executive for the FOX Team that provided procurement support services to Iowa DHS for several Iowa Medicaid contracts, including the State's Medicaid Management Information System (MMIS) contract. The project included a review of operational policies and procedures, technical analysis of the current MMIS, MMIS requirements analysis, and development, development of a technical approach to HIPAA compliance, and writing of the Request for Proposal (RFP) document. Additional tasks included preparation of an Implementation Advanced Planning Document (IAPD), bidder's conference support, bidder proposal evaluation training and technical assistance, and contract negotiation support. During implementation, Client Executive to Noridian Administrative Services, Core MMIS vendor, provided key staff augmentation and risk management services.

State of Oregon, Department of Human Services (DHS)

Served as Account Manager, responsible for leading a team of FOX consultants to provide DHS and the Office of Medical Assistance Programs (OMAP) with an MMIS that meets all state and Federal Medicaid and certification requirements, including applicable HIPAA regulations, and meets all current OMAP MMIS functional and business requirements.

Project responsibilities included:

- Successfully leading data gathering and analysis and proposed solutions to the large number of pended and denied encounters that previously placed the health plan on a Corrective Action Plan (CAP) by AHCCCS
- Supporting timely claims and encounter submission to AHCCCS
- Developing internal policies and procedures, including audit best practices
- Performing as a Health Information Technology SME for client IT executive leadership

Other Project Experience

- Headed the development of requirements analysis and design documents for a statewide Medicaid Management Information System program for the State of Ohio. As Project Manager, headed a team of over 15 technical staff to complete a \$10 million project in a timely and cost-effective manner.
- For the State of Florida, headed the requirements analysis and development project to design, develop, and install Consultec's Pharmacy Point-of-Sales Claims Adjudication Systems. This system has now been adopted by Consultec's PBM services that provide pharmacy benefits to all of Consultec's Medicaid states including Florida, West Virginia, Montana, Wyoming, Washington, New Mexico, and Colorado.
- Headed the effort for development of an interface between the Florida Medicaid system and the State Eligibility Determination and Client Management System (FLORIDA) that was developed by EDS. This effort included conducting a requirements analysis, developing an Advance Planning Document (APD), and obtaining Health Care Financing Administration (HCFA) approval for the multimillion-dollar change order.
- Consultec's PBM services also use this system to manage prescription benefits for a dozen other commercial and managed care clients.
- Managed the team that developed the Florida magnetic stripe plastic Medicaid ID card. Coordinated a full requirements analysis, developed an APD, and obtained Health Care Financing Administration (HCFA) approval before implementation of the plastic card for Florida's two million Medicaid recipients.
- As Project Manager to implement Medicare Part B systems, implemented the Medicare Part B claims system and managed the claims operations for the State of Louisiana.

- As part of the team at System Development Corporation (SDC), participated in the requirements analysis, logical design, physical design, development, and implementation of the Medicare Part B system for the State of Louisiana.
- As part of the team at Consultec, designed, developed, and implemented an advanced MMIS for the State of Ohio.
- Experienced in developing and implementing Electronic Data Interchange (EDI) product lines. This experience is extremely valuable in understanding and overseeing the implementation of HIPAA in any healthcare environment, in particular Medicaid and Managed Care. These EDI products were implemented for clients such as PCA Family Health Plans (HealthLink), Wellcare, Tennessee Managed Care Network, and Vanderbilt Health Plan.
- Contracted with numerous clients to provide technical assistance in developing Medicaid systems and billing requirements as an Independent Consultant. Clients included Ohio Hospital Association, SysteMetrics (now Thomson Reuters), Michigan Department of Social Services, and System Development Corporation.

Education

- BA, History, Ohio State University, Columbus, Ohio
- Graduate Studies, City and Regional Planning 1973-1974

Professional Organizations

- Medicaid Private Sector Technical Advisory Group Arizona Health-e Connection, Member
- Arizona Health e Connection (Arizona REC)

References

Reference 1

Eugene I. Gessow
Director, Division of Medical Services
Arkansas Department of Human Services
4th Floor,
Donaghey Plaza South
Little Rock, Arkansas 72203
Eugene.Gessow@arkansas.gov
Office 501-682-8292
Fax 501-682-1197

Reference 2

Ray Scott
Arkansas HIT Coordinator
Office of Health Information Technology
1401 West Capitol Avenue
Victory Building, Plaza G
Little Rock, Arkansas 72201
Ray.Scott@hit.arkansas.gov
Office: 501-410-1999
Fax: 501-978-3940

Reference 3

Angela Ramsey
Government Analyst II
Agency for Healthcare Administration
2727 Mahan Drive, Mail Stop 56
Tallahassee, FL 32308
Angela.Ramsey@ahca.myflorida.com
Office: 850-413-8031

Tab 5 RFP Forms

3.2.5 Information to Include Behind Tab 5: RFP Forms.

The forms listed below are attachments to this RFP. Fully complete and return these forms behind Tab 3:

- Release of Information Form
- Primary Bidder Detail & Certification Form
- Subcontractor Disclosure Form (one for each proposed subcontractor)

Attachment A Release of Information

Attachment A: Release of Information

(Return this completed form behind Tab 3 of the Bid Proposal.)

William Larkin Consulting LLC hereby authorizes any person or entity, public or private, having any information concerning the bidder's background, including but not limited to its performance history regarding its prior rendering of services similar to those detailed in this RFP, to release such information to the Agency.

The bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the Agency or may otherwise hurt its reputation or operations. The bidder is willing to take that risk. The bidder agrees to release all persons, entities, the Agency, and the State of Iowa from any liability whatsoever that may be incurred in releasing this information or using this information.

William Larkin Consulting, LLC

Printed Name of Organization

Signature of Authorized Representative

Date August 16, 2011

William Larkin

Printed Name

Attachment B Primary Bidder Detail Form & Certification

Attachment B: Primary Bidder Detail Form & Certification

(Return this completed form behind Tab 3 of the Proposal. If a section does not apply, label it "not applicable".)

Primary Contact Information (individual who can address issues re: this Bid Proposal)	
Name:	William Larkin Consulting, LLC
Address:	14388 East Geronimo Road Scottsdale, Arizona 85259
Tel:	480 776 9996
Fax:	480 451 4319
E-mail:	billlark@gmail.com

Primary Bidder Detail	
Business Legal Name ("Bidder"):	William Larkin Consulting, LLC
"Doing Business As" names, assumed names, or other operating names:	Not Applicable
Parent Corporation, if any:	Not Applicable
Form of Business Entity (i.e., corp., partnership, LLC, etc.):	LLC
State of Incorporation/organization:	Arizona
Primary Address:	14388 East Geronimo Road Scottsdale, Arizona 85259
Tel:	480 776 9996
Fax:	480 451 4319
Local Address (if any):	None
Addresses of Major Offices and other facilities that may contribute to performance under this RFP/Contract:	Not Applicable
Number of Employees:	1 (Staffing through Subcontracts/Associates 5)
Number of Years in Business:	2
Primary Focus of Business:	Health Care IT Consulting
Federal Tax ID:	2-----1
Bidder's Accounting Firm:	Hunter Hagen
If Bidder is currently registered to do business in Iowa, provide the Date of Registration:	Not Applicable
Do you plan on using subcontractors if awarded this Contract? {If "YES," submit a Subcontractor Disclosure Form for each proposed subcontractor.}	No

Request for Confidential Treatment (See Section 3.1)		
Location in Bid (Tab/Page)	Statutory Basis for Confidentiality	Description/Explanation
Tab 5 Attachment B	Includes personal data	Tax ID

Exceptions to RFP/Contract Language (See Section 3.1)

RFP Section and Page	Language to Which Bidder Takes Exception	Explanation and Proposed Replacement Language:	Cost Savings to the Agency if the Proposed Replacement Language is Accepted
None			

BID PROPOSAL CERTIFICATION

By signing below, Bidder certifies that:

- Bidder accepts and will comply with all Contract Terms and Conditions contained in the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification.
- Bidder has reviewed the Additional Certifications, which are incorporated herein by reference, and by signing below represents that Bidder agrees to be bound by the obligations included therein.
- Bidder does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap;
- No cost or pricing information has been included in the Bidder's Technical Proposal;
- Bidder has received any amendments to this RFP issued by the Agency;
- Bidder either is currently registered to do business in Iowa or agrees to register if Bidder is awarded a Contract pursuant to this RFP;
- The person signing this Bid Proposal certifies that he/she is the person in the Bidder's organization responsible for, or authorized to make decisions regarding the prices quoted and he/she has not participated, and will not participate, in any action contrary to the anti-competitive agreements outlined above;
- Bidder specifically stipulates that the Bid Proposal is predicated upon the acceptance of all terms and conditions stated in the RFP and the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification. Objections or responses shall not materially alter the RFP. All changes to proposed contract language, including deletions, additions, and substitutions of language, must be addressed in the Bid Proposal;
- Bidder certifies that the Bidder organization has sufficient personnel resources available to provide all services proposed by the Bid Proposal, and such resources will be available on the date the RFP states services are to begin. Bidder guarantees personnel proposed to provide services will be the personnel providing the services unless prior approval is received from the Agency to substitute staff;
- Bidder certifies that if the Bidder is awarded the contract and plans to utilize subcontractors at any point to perform any obligations under the contract, the Bidder will (1) notify the Agency in writing prior to use of the subcontractor, and (2) apply all restrictions, obligations, and responsibilities of the resulting contract between the Agency and contractor to the subcontractors through a subcontract. The contractor will remain responsible for all Deliverables provided under this contract.
- Bidder guarantees the availability of the services offered and that all Bid Proposal terms, including price, will remain firm until a contract has been executed for the services contemplated by this RFP or one year from the issuance of this RFP, whichever is earlier; and,
- Bidder certifies it is either a) registered or will become registered with the Iowa Department of Revenue to collect and remit Iowa sales and use taxes as required by Iowa Code chapter 423; or b) not a "retailer" of a "retailer maintaining a place of business in this state" as those terms are defined in Iowa Code subsections 423.1(42) & (43). The Bidder also acknowledges that the Agency may declare the bid void if the above certification is false. Bidders may register with the Department of Revenue online at: <http://www.state.ia.us/tax/business/business.html>.
- By signing below, I certify that I have the authority to bind the Bidder to the specific terms, conditions and technical specifications required in the Agency's Request for Proposals (RFP) and offered in the Bidder's Proposal. I understand that by submitting this Bid Proposal, the Bidder agrees to provide services described herein which meet or exceed the requirements of the Agency's RFP unless noted in the Bid Proposal and at the prices quoted by the Bidder. I certify that the contents of the Bid Proposal are true and accurate and that the Bidder has not made any knowingly false statements in the Bid Proposal.

Signature:	
Printed Name/Title:	William Larkin Manager
Date:	August 16, 2011

Attachment C Subcontractor Disclosure Form

Not Applilcable

Tab 6 Bidder's Background

3.2.6 Information to Include Behind Tab 6: Bidder's Background.

3.2.6.1 Termination, Litigation, and Investigation.

Bid Proposals must indicate whether any of the following conditions have been applicable to the bidder, or a holding company, parent company, subsidiary, or intermediary company of the bidder during the past five (5) years. If any of the following conditions are applicable, then the bidder shall state the details of the occurrence. If none of these conditions is applicable to the bidder, the bidder shall so indicate.

William Larkin Consulting has never had a situation that has resulted in termination of any contract, or any litigation or investigation. The Table below provides a specific response for each bulleted item:

RFP Requirement	WLC Response
List any contract for services that the bidder has had that was terminated for convenience, non-performance, non-allocation of funds, or any other reason for which termination occurred before completion of all obligations under the contract provisions.	None
List any occurrences where the bidder has either been subject to default or has received notice of default or failure to perform on a contract. Provide full details related to the default or notice of default including the other party's name, address, and telephone number.	None
List any damages, penalties, disincentives assessed, or payments withheld, or anything of value traded or given up by the bidder under any of its existing or past contracts as it relates to services performed that are similar to the services contemplated by this RFP. Include the estimated cost of that incident to the bidder with the details of the occurrence.	None
List and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters related to the subject matter of the services sought in this RFP.	None
List any irregularities that have been discovered in any of the accounts maintained by the bidder on behalf of others. Describe the circumstances of irregularities or variances and detail how the issues were resolved.	None
List any details of whether the bidder or any owners, officers, primary partners, staff providing services or any owners, officers, primary partners, or staff providing services of any subcontractor who may be involved with providing the services sought in this RFP, have ever had a founded child or dependent adult abuse report, or been convicted of a felony.	None

WLC acknowledges that this is a continuing requirement. WLC will provide a timely disclosure of any relevant manner within 30 days of conviction.

